

Solutions for every portfolio

STRATEGY CATEGORIES

	AVAILABLE MUTUAL FUND AND VA PLATFORMS												MARKET SCORES				
	Trust Company of America	Schwab	Fidelity	Nationwide	Jackson National Life	Allianz	Western Reserve Life	Jefferson National	AXA Equitable	Pacific Life	TIAA-CREF	Security Benefit Life	Bull market score	Bear market score	Sideways market score	Average market score	Correlation to S&P 500 Index (3 year)
CORE —suitability-based strategies for different strategic goals																	
Dynamic Fund Profiles	•												65–35	97–77	70–54	66–51	0.61–0.72
Evolution Plus	•												136–45	107–84	72–58	114–61	0.33–0.50
Faith Focused Investing	•												61–35	89–57	66–42	58–49	0.75–0.82
Fusion	•	•		•				•									0.32–0.53
Lifetime Evolution	•		•	•	•	•	•	•	•	•	•	•	68–17	105–63	74–40	66–41	0.65–0.68
Market Leaders Dynamic	•			•				•				•	79–35	100–89	67–43	76–52	0.37–0.51
Market Leaders Strategic	•	•	•	•	•	•	•	•	•	•	•	•	93–41	111–77	80–57	85–60	0.41–0.77
Market Leaders Tactical	•			•	•	•	•	•	•	•	•	•	91–36	100–51	74–44	76–54	0.41–0.77
DOMESTIC TACTICAL EQUITY —dynamic, risk-managed equity strategies																	
A Better Buy & Hold	•												79	47	47	68	0.85
Classic	•	•		•	•	•	•	•	•	•	•	•	63	109	65	72	0.61
Diversified Tactical Equity	•	•															
Evolution II	•												78	66	45	71	0.78
Market Leaders Equity Only	•												119	24	41	90	0.75
Political Seasonality Index	•	•		•				•				•	102	31	28	78	0.71
Self-adjusting Trend Following	•	•		•			•	•				•	150	168	46	139	0.22
Systematic Advantage	•	•		•				•				•	68	62	63	66	0.77
Volatility Adjusted NASDAQ	•	•		•				•				•	108	101	30	96	0.34
MEAN REVERSION/PATTERN RECOGNITION —seeks to deliver a sideways/choppy market solution																	
Contrarian S&P Trading	•												44	104	81	60	0.27
S&P Tactical Patterns	•	•											91	96	82	91	0.20
Third Day Tactical Blend	•												79	122	81	87	0.11
Third Day Tactical Blend Balanced	•	•											59	118	80	73	0.11
FIXED INCOME —substitute for bond portfolio																	
Diversified Bonds	•	•															
Global Macro Income-Tactical	•												36	109	70	55	0.45
Global Maturities	•			•				•					24	111	78	48	0.28
Managed Income	•	•		•				•				•	34	104	76	53	0.00
Strategic High Yield Bond	•	•		•				•				•	24	129	86	73	0.16
WP Income Builder	•												52	110	80	67	0.34
TACTICAL FIXED INCOME —aggressive trading vehicle using leverage and inverse bond funds																	
Government Bond Trading	•												77	139	110	93	-0.17
Managed Income Aggressive	•	•		•									61	141	84	79	0.05
Systematic Long/Short Bond Trading	•	•		•				•				•	35	162	84	66	0.47
ALTERNATIVES —supplies answers for alternative strategy & asset class needs)																	
Gold Equities Trading	•												3	141	75	39	-0.02
Hedged Gold Bullion	•	•											10	126	67	40	-0.14
Select Alternatives	•	•		•				•					55	103	57	64	0.53
Tactical Hard Assets	•												46	98	62	58	0.41
TVA Gold	•	•											15	118	90	45	0.05

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ALL TERRAIN —seeks to deliver an absolute return strategy for all market environments																		
All Weather Dynamic - Leveraged	•												47	97	75	61	0.35	
All Weather Dynamic - Unleveraged	•												43	99	74	58	0.56	
All Weather Static	•												37	99	76	54	0.42	
Trivantage - Leveraged	•												61	115	57	70	0.36	
Trivantage - Unleveraged	•												49	114	65	64	0.34	
SECTORS —aggressive strategies seeking selective participation in domestic equity sectors																		
Bear Necessities	•	•		•				•				•	84	69	49	77	0.54	
Best Tech	•	•		•				•				•	60	50	35	54	0.47	
Market Leaders Sector Growth	•	•											104	73	52	90	0.56	
Market Leaders Sector Growth Ultra	•	•											144	66	64	118	0.57	
Sector Index Rotation	•	•											105	181	91	117	0.09	
Sector Select	•	•						•					73	40	47	63	0.77	
INTERNATIONAL —equity and bond solutions for global investing																		
Global Select	•			•				•				•	75	80	43	71	0.53	
Global Maturities	•			•				•					24	111	78	48	0.28	
Global Macro Equity—Tactical	•												105	94	53	96	0.45	
Global Macro Income—Tactical	•												36	109	70	55	0.45	
Tactical Emerging Markets	•												105	72	53	92	0.60	
PRINCIPLED INVESTING —specialty strategies supportive of client world view																		
Faith Focused Investing	•												61–35	89–57	66–42	58–49	0.82–0.75	
For a Better World	•												58	97	45	63	0.64	

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PAST PERFORMANCE DOES NOT GUARANTEE FUTURE RESULTS. Inherent in any investment is the potential for loss as well as profit. A list of all recommendations made within the immediately preceding twelve months is available upon written request.

BULL / BEAR / SIDEWAYS SCORES

The Bull / Bear / Sideways scores may assist in assessing a strategy's behavior in various market regimes. The scores are based on research presented in a 2014 white paper entitled "Bull, Bear and Sideways Markets: A Tri-state Market Classification for Evaluating Active Investment Strategies" by Jerry C. Wagner and Z. George Yang, Ph.D. The scores shown were calculated for the period January 1998 through September 2014, using hypothetical performance for the strategy, and the S&P 500 Index as the benchmark. Scores will only change substantially after a 20% decline in the S&P 500 Index. The scores are defined mathematically as:

- Bull score: the percentage of upside return capture of the strategy, with the benchmark's score defined as 100.
- Bear score: the percentage of downside loss avoidance of the strategy, with the benchmark's score defined as zero.
- Sideways score: both the excess return of the strategy and its maximum drawdown reduction, with the benchmark's score defined as 50.
- The average ("AVG") score shown is weighted by the number and duration of bull, bear, and sideways segments over the multi-year calibration period.

The parameters defining bull, bear, and sideways markets were:

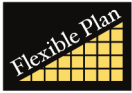
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- Sideways: fluctuation of at least 10%, ending the period unchanged.
- Each period must endure for at least 42 days.

For suitability-based strategies, the range of maximum and minimum scores are for all suitability profiles of the strategy; the maximum score and minimum score may not necessarily be for the most aggressive or most conservative risk profile.

Information generated by bull, bear, and sideways analysis regarding the likelihood of investment outcomes is hypothetical in nature and does not reflect actual investment results, and is not a guarantee of future results.

Investors should carefully consider information contained in the prospectus, including investment objectives, risks, charges and expenses. You can request a prospectus by contacting your financial advisor. Please read the prospectus carefully before investing. Investment value will fluctuate, and shares, when redeemed, may be worth more or less than original cost.

See Bull, Bear, and Sideways Market Regime Scores Explanation for more information



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ETF CATEGORIES

	AVAILABLE ETF PLATFORMS						MARKET SCORES					
	Folio Institutional - WITH OT*	Schwab- WITH OT*	Fidelity Institutional - WITH OT*	Investnet	Folio DX	Geneos SelectOne	Transamerica ONE	Bull market score	Bear market score	Sideways market score	Average market score	Correlation to S&P 500 Index (3 year)
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Evolution Plus	•							136-45	107-84	72-58	114-61	0.33-0.50
Market Leaders Strategic	•	•	•				•	93-41	111-77	80-57	85-60	0.41-0.77
DOMESTIC TACTICAL EQUITY —dynamic, risk-managed equity strategies												
Rotational No-load ETF		•										
Rotational No-load ETF/SAF		•										
Self-adjusting Trend Following	•			•	•	•		150	168	46	139	0.22
Style Rotation			•									
FIXED INCOME —substitute for bond portfolio												
Global Maturities	•		•				•	24	111	78	48	0.28
Managed Income	•	•	•					34	104	76	53	
Municipal Bonds			•									
ALTERNATIVES —supplies answers for alternative strategy & asset class needs												
Hedged Gold Bullion	•				•			10	126	67	40	-0.14
Select Alternatives	•		•		•		•	55	103	57	64	0.53
ALL TERRAIN —seeks to deliver an absolute return strategy for all market environments												
All Weather Dynamic - Leveraged	•				•			47	97	75	61	0.35
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Smarter Beta	•		•		•			88	95	59	85.69	
Trivantage - Leveraged	•				•			61	115	57	70	0.36
Trivantage - Unleveraged	•		•		•			49	114	65	64	0.34
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Sector Rotation			•									
INTERNATIONAL —equity and bond solutions for global investing												
Global Maturities	•		•				•	24	111	78	48	0.28
Global Select	•		•				•	75	80	43	71	0.53
International Rotation			•									

*WITH ONTARGET INVESTING REPORTING

INVESTMENT PROFESSIONAL USE ONLY

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Information generated by bull, bear, and sideways analysis regarding the likelihood of investment outcomes is hypothetical in nature and does not reflect actual investment results, and is not a guarantee of future results. The Bull/Bear/Sideways scores are calculated with mutual funds. It is assumed that the mutual fund and Exchange Traded Funds (ETF) research results are similarly close.

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